

# NC COVID

**New Person**  **, New Event**   
**or New Lab**  **?**

How can you tell and avoid creating duplicates?

# New Person, New Event, or New Lab



**New Person** – You add a new person in the application when you have searched and determined that a person that matched your search criteria does not exist

# New Person, New Event, or New Lab



**New Event** – you add a new event when you search and determine that a person matching your criteria exists

AND

- They have a closed event OR
- They have an open event where the specimen collection date of a positive lab that is outside of the 90-day window

# New Person, New Event, or New Lab

Add Lab Result

**New Lab** – you add a new lab onto an existing event on an existing person when you confirm that the person matched your search criteria AND they have an open event where the specimen collection date of the positive lab is within the 90-day window

# Searching Recap

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 **Conducting a Proper Search**

# Search Features

**Users can search 2 ways to determine if a person/event already exists:**

## **Person Search**



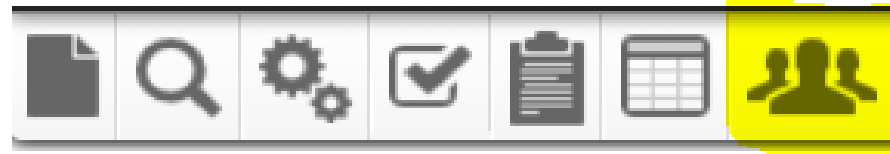
- Displays all PERSON, regardless of the county groups(s) you see/are assigned to

## **Event Search**



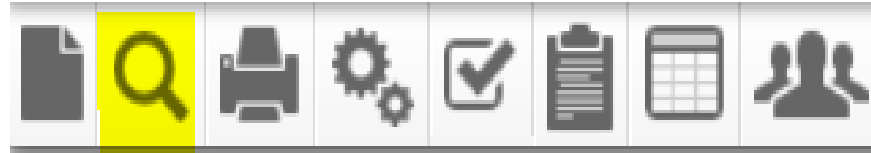
- Only displays persons with disease EVENTS within the county group(s) the user has permission to see

# Search Person Feature



- ALL users can see ALL persons in NC COVID
- Searching for a person can ensure that you don't create a duplicate person/event
- Searching for a person is the **RECOMMENDED** search procedure

# Search Event Feature



- Users can only see events in the county group(s) they are assigned
- Searching by event can lead to mistakes with creating duplicate persons

Event Summary	
Basic Information	
Event ID:	170002210
Disease:	Coronavirus (COVID-19)
Person:	<a href="#">Doug smith</a> Birth Date: 06/02/1983 ( 38 Male ) Phone: (777) 666-5555
	Deduplication Status: Pending <a href="#">Deduplicate</a>
Type:	Interactive
Investigation Status:	Open
Linked Events/Contacts:	0 linked event(s)/contact(s) ( <a href="#">View</a> )
Attachments:	0 attachment(s) ( <a href="#">Add</a> )

# Search vs Select Person

- The Search Person icon is NOT the same as going straight to the Create Event icon and clicking the Person button
- When you search on a person from the Create Event screen you are automatically telling the application that you want to create a new event if you select a person from the search

**Create Event - Person Information**

**Event Information**  
Disease:

**Add Person**  
First Name:  Middle Name:  Last Name:   
Suffix:  Maiden/Other Name:  Alias:   
Mother's Maiden Name:   
Birth Date:  Gender:  Social Security Number:   
MM/DD/YYYY

**Contact Information**  
Address Type:  Street:   
Home  
City:  State:  Zip Code:   
NC  
County:  Country:   
USA  
Home Phone:  Mobile Phone:  Work Phone:   
Contact Method:  Residence Type:  Address Status:   
Select Person... Clear

# Searching for a Person

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 **Screen Shots and Guidance**

# Search Person Screens



Search Party (Person)  
screen offers elements  
available when you create  
a person

## Search Party

### Search Criteria

Class:	Event ▼
Category:	Person ▼
Party ID:	<input type="text"/>
Last Name:	<input type="text" value="Bell"/>
First Name:	<input type="text" value="Tinker"/>
Maiden/Other Name:	<input type="text"/>
Alias:	<input type="text"/>
Birth Date: (Inexact)	<input type="text" value="MM/DD/YYYY"/>
Gender:	▼
Street:	<input type="text"/>
City:	<input type="text"/>
State:	▼
Zip Code:	<input type="text"/>
Mother's Maiden Name:	<input type="text"/>
Phone:	<input type="text"/>

### Sort Options

Sort By:	Name ▼
Sort Order:	Ascending ▼

### Search Options

Search History:	<input checked="" type="checkbox"/>
Search Soundex:	<input type="checkbox"/>

Search

Clear

# Search Person Screens

- **Search using one or more fields and with wildcards**
- **Be Creative!**
  - Name (first and/or last combination) & DOB
  - Name Only-using variations of names that have alternative spellings or first names with common nicknames
- **DOB only**
- **SSN**
- **Phone Number**

## Examples of possible names to Search

	Smith-Jones*
Robert*	Smith-Jones*
Robert*	*Smith*
Bob*	Smith*
Rob*	Smi*
Robert*	*Jones*
Rob*	*Jones*
Ro*	*Jon*
Bob*	*Jones*

\* This is not every possible combo

Use your best judgement to search

# Search Person Screens

- Search results display to the right side of search criteria
- In order to determine if the person(s) in the search results are a match to your person, double-click the person's name to go to the person summary screen

### Search Party

#### Search Criteria

Class:

Category:

Party ID:

Last Name:

First Name:

Maiden/Other Name:

Alias:

Birth Date:

Gender:

Street:

City:

State:

Zip Code:

Mother's Maiden Name:

Phone:

#### Sort Options

Sort By:

Sort Order:

#### Search Options

Search History: ☒

Search Soundex: ☐

#### Search Results

Name	Birth Date	Street Address
▶ Bell, Tinker	07/24/1989	225 N McDowell Street

Showing 1 to 1 of 1 entries

# Search Person Screens

- You will only see the events for the county group(s) you have permissions to see
- If the person had COVID in more than one county, you may not see that event

**Person Summary**

**Demographic Information** [\(View History\)](#)

Name:	Bell, Tinker
Maiden/Other Name:	
Alias:	
Gender:	Female
Birth Date:	07/24/1989
Death Date:	
Living Status:	Alive
Age:	31
Social Security Number:	
Party ID:	PCWFGRORHRHQ
Create Date:	06/16/2021

**Notes**


**Contact Information**

Type	Address	County	Country
Home * Primary	225 N McDowell Street, Raleigh, NC 27603	Wake County	USA

Edit Person

**Event Information**

**Events**

Event ID	Person	Status	Create Date
170002255 	Bell, Tinker	Open	06/16/2021



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# Creating New Event

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**For a NEW Person**


# Create New Event/New Person


You have searched and determined that no person exists, so you create a new person

- Click on Create Event icon



- Select Disease from dropdown menu

Event Information	
Disease:	Coronavirus (COVID-19) 



# Create a New Event/New Person

- Enter the Person information exactly as it is on the lab you have
- If there is information missing on the lab, add a note in the Investigation Trail or Dashboard
- Use sentence case format and no punctuation

The screenshot shows a web interface with two main sections. The top section, titled "Event Information", contains a "Disease:" label and a dropdown menu currently showing "Coronavirus (COVID-19)". The bottom section, titled "Add Person", contains several input fields arranged in a grid. The "First Name:" field contains "Tinker", "Middle Name:" is empty, and "Last Name:" contains "Bell". Below these, "Suffix:" is empty, "Maiden/Other Name:" is empty, and "Alias:" is empty. Further down, "Mother's Maiden Name:" is empty. At the bottom, "Birth Date:" contains "07/24/1989" with a calendar icon, "Gender:" is a dropdown menu showing "Female", and "Social Security Number:" is empty.

Event Information		
Disease:	Coronavirus (COVID-19) ▼	

Add Person		
First Name:	Middle Name:	Last Name:
Tinker		Bell
Suffix:	Maiden/Other Name:	Alias:
Mother's Maiden Name:		
Birth Date:	Gender:	Social Security Number:
07/24/1989	Female ▼	

# Create a New Event/New Person

- Use USPS standards for addresses, Ex: St, Rd, Ave, etc
- Apartment, Unit, Lot number should go on the 2<sup>nd</sup> address line

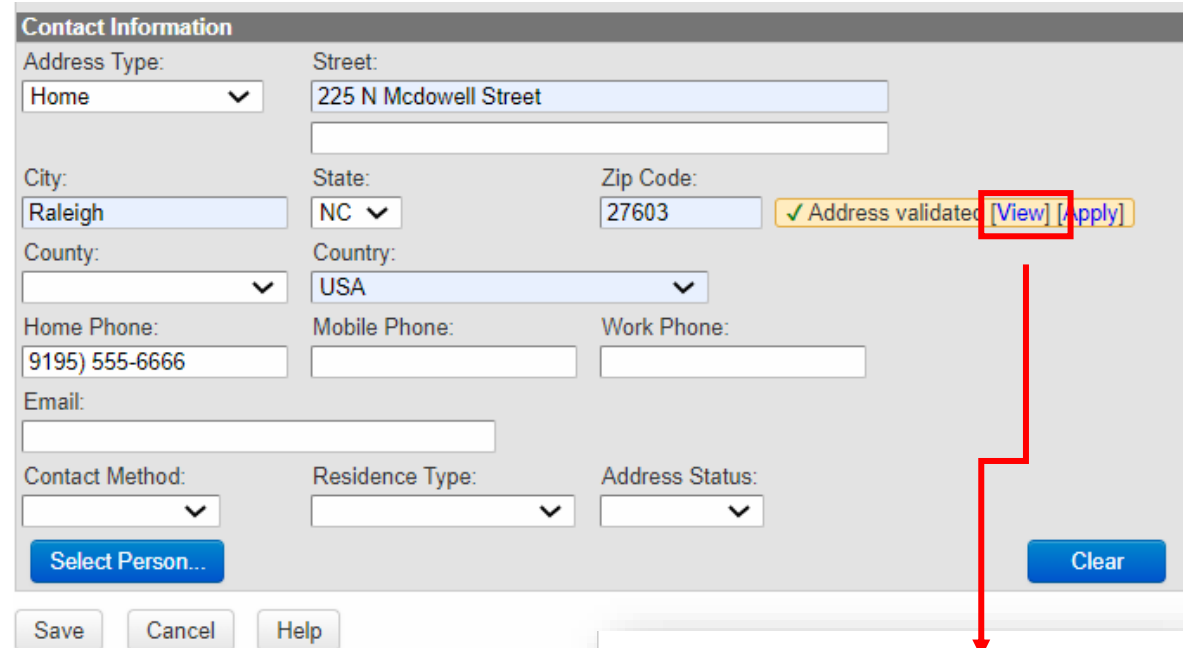
The screenshot shows a 'Contact Information' form with the following fields and values:

Contact Information		
Address Type: Home ▼	Street: 225 N McDowell Street	
City: Raleigh	State: NC ▼	Zip Code: 27603
County: Wake County ▼	Country: USA ▼	
Home Phone: (919) 555-6666	Mobile Phone:	Work Phone:
Email:		
Contact Method: ▼	Residence Type: ▼	Address Status: ▼
Select Person...		Clear
Save	Cancel	Help

The 'Save' button is highlighted with a red box.

# Create a New Event/New Person

**NOTE:** If the system recognizes the address, validation will run, and you may have the option to 'View' or 'Apply'. ALWAYS select 'View' as sometimes the system will change the street address. If your address matched exactly, click Apply. If they do not, click Close.



The 'Contact Information' form contains several input fields: Address Type (Home), Street (225 N McDowell Street), City (Raleigh), State (NC), Zip Code (27603), County, Country (USA), Home Phone (919) 555-6666, Mobile Phone, Work Phone, Email, Contact Method, Residence Type, and Address Status. A yellow banner indicates 'Address validated' with 'View' and 'Apply' buttons. A red arrow points from the 'View' button to the 'Address Validation Results' window below.

Buttons at the bottom: Select Person..., Save, Cancel, Help, Clear.

## Address Validation Results

Address Differences		
Field	Entered	Validated
Street	225 N McDowell Street	225 N Mc Dowell St
City	Raleigh	Raleigh
State	NC	NC
Zip Code	27603	27603
County		Wake County
Latitude	35.78296081632653	
Longitude	-78.64159530612245	
<a href="#">View Map</a>		

# Create a New Event/New Person

- Review the information you have entered to ensure it is accurate and complete
- Click the Save button and your person will be created, along with a new event.

The screenshot shows a web form with three main sections: Event Information, Add Person, and Contact Information. The 'Event Information' section has a 'Disease' dropdown set to 'Coronavirus (COVID-19)'. The 'Add Person' section contains fields for First Name (Tinker), Middle Name, Last Name (Bell), Suffix, Maiden/Other Name, Alias, Mother's Maiden Name, Birth Date (07/24/1989), Gender (Female), and Social Security Number. The 'Contact Information' section includes Address Type (Home), Street (225 N McDowell Street), City (Raleigh), State (NC), Zip Code (27603), County (Wake County), Country (USA), Home Phone ((919) 555-6666), Mobile Phone, Work Phone, Email, Contact Method, Residence Type, and Address Status. At the bottom, there are buttons for 'Select Person...', 'Save', 'Cancel', 'Help', and 'Clear'. The 'Save' button is highlighted with a red rectangle.

**Event Information**  
Disease: Coronavirus (COVID-19) ▼

**Add Person**  
First Name: Tinker Middle Name: Last Name: Bell  
Suffix: Maiden/Other Name: Alias:  
Mother's Maiden Name:  
Birth Date: 07/24/1989 Gender: Female Social Security Number:

**Contact Information**  
Address Type: Home Street: 225 N McDowell Street  
City: Raleigh State: NC Zip Code: 27603  
County: Wake County Country: USA  
Home Phone: (919) 555-6666 Mobile Phone: Work Phone:  
Email:  
Contact Method: Residence Type: Address Status:

Select Person... Save Cancel Help Clear



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# Creating New Event

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For a EXSISTING Person

# Create a New Event/Existing Person

- You searched and found an existing person, but determine that you need to create a new event
- Copy the Party ID in the Demographic section of the Person Summary screen
- The Party ID is the unique identifier for this person

## Person Summary

### Demographic Information ([View History](#))

Name:	Bell, Tinker
Maiden/Other Name:	
Alias:	
Gender:	Female
Birth Date:	07/24/1989
Death Date:	
Living Status:	Alive
Age:	31
Social Security Number:	
Party ID:	PCWFGRORHRHQ
Create Date:	06/16/2021

# Create a New Event/Existing Person

- Click the Create Event icon on the toolbar
- From the Create Event Screen, select the Disease and click the Select Person Button


The screenshot shows the 'Create Event - Person Information' form. The 'Event Information' section has a 'Disease' dropdown set to 'Coronavirus (COVID-19)'. The 'Add Person' section has a dropdown menu open, showing 'Coronavirus (COVID-19)' and 'Coronavirus death (COVID-19D)'. A red arrow points to the 'Coronavirus (COVID-19)' option. The 'Contact Information' section has various fields for address, phone, and email. The 'Select Person...' button is highlighted with a red box.

# Create a New Event/Existing Person

- Paste the Person ID that you copied from the Person Summary screen into the Party ID search field, then click the search button
- Select the person from the Search Results

## Search Party

### Search Criteria

Party ID:	PCWFGROHRHQ
Last Name:	
First Name:	
Maiden/Other Name:	
Alias:	
Birth Date: (Inexact)	MM/DD/YYYY 
Gender:	<input type="text" value="v"/>
Street:	
City:	
State:	<input type="text" value="v"/>
Zip Code:	
Mother's Maiden Name:	
Phone:	

### Sort Options

Sort By:	Name <input type="text" value="v"/>
Sort Order:	Ascending <input type="text" value="v"/>

### Search Options

Search History:	<input checked="" type="checkbox"/>
Search Soundex:	<input type="checkbox"/>

<input type="button" value="Search"/>	<input type="button" value="Clear"/>
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### Search Results

#### Search Results

Name	Birth Date	Street Address	City
▶ Bell, Tinker	07/24/1989	225 N McDowell Street	Raleigh

Showing 1 to 1 of 1 entries

<input type="button" value="Select"/>	<input type="button" value="Cancel"/>	<input type="button" value="Help"/>
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# Create a New Event/Existing Person

- The person information will be auto-populated in the Create Event Screen
- Click the save button to create a new event

**Event Information**

Disease: Coronavirus (COVID-19) ▼

**Add Person**

First Name: Tinker Middle Name: Last Name: Bell

Suffix: Maiden/Other Name: Alias:

Mother's Maiden Name:

Birth Date: 07/24/1989 Gender: Female ▼ Social Security Number:

**Contact Information**

Address Type: Home ▼ Street: 225 N McDowell Street

City: Raleigh State: NC ▼ Zip Code: 27603

County: Wake County ▼ Country: USA ▼

Home Phone: (919) 555-6666 Mobile Phone: Work Phone:

Email:

Contact Method: Residence Type: Address Status:

Select Person... Clear

Save Cancel Help

# Create a New Event/Existing Person

- The new disease event is created, and the event is now ready for data entry

### Event Summary

Basic Information		Notes (Add/Edit   Show My Notes)
Event ID:	170002256	
Disease:	Coronavirus (COVID-19)	
Person:	<a href="#">Tinker Bell</a> Birth Date: 07/24/1989 ( 31 Female ) Phone: (919) 555-6666	
Type:	Interactive	
Investigation Status:	Open	
Linked Events/Contacts:	0 linked event(s)/contact(s) ( <a href="#">View</a> )	
Linked Exposure Sites:	0 linked exposure site(s) ( <a href="#">View</a> )	
Attachments:	0 attachment(s) ( <a href="#">Add</a> )	
Notifications:	<div>Race has not been selected for this person</div> <div>Best date for illness identification is missing</div> <div>Initial date of report to public health is missing and is required</div>	
	Classification: Unspecified	
	County of residence: Wake County	
	Earliest COVID-19 Diagnosis Date:	
	<div>Active outbreak: Mecklenburg COVID-19 Schrute Farms Assisted Living Outbreak May 2021 (<a href="#">Link to Outbreak</a>) (<a href="#">Open</a>)</div> <div>Active outbreak: Mecklenburg County East Mecklenburg High School - May 2020 (<a href="#">Link to Outbreak</a>) (<a href="#">Open</a>)</div> <div>Active outbreak: Warren County Detention Center May 2020 Outbreak (<a href="#">Link to Outbreak</a>) (<a href="#">Open</a>)</div> <div>Active outbreak: Mecklenburg Co Majestic Oaks June 2020 Outbreak (<a href="#">Link to Outbreak</a>) (<a href="#">Open</a>)</div> <div>Active outbreak: Union Co Tyson Processing Plant May 2020 Outbreak (<a href="#">Link to Outbreak</a>) (<a href="#">Open</a>)</div>	

Edit Event PropertiesCopy Event

Event Data

Lab Results

Concerns

Persons

Tasks

Calendar

Event Properties

Event History

### Question Packages

Question Package	Person	Last Update
01. Administrative	Tinker Bell	06/16/2021
02. Demographic	Tinker Bell	06/16/2021
03. Clinical	Tinker Bell	06/16/2021
04. Risk History	Tinker Bell	06/16/2021
09. Risk Questions - Part 1	Tinker Bell	06/16/2021
10. Contact Tracing	Tinker Bell	06/16/2021
11. Vaccination	Tinker Bell	06/16/2021
14. Electronic Transmission Information	Tinker Bell	06/16/2021

View Question Package Wizards View Wizard



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# Adding a New Lab

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On an Existing Event

# Add a New Lab on Existing Event

- You search and found the existing person and a review of the event shows an existing lab within 90 days
- You click the Add Lab Result button to add a new lab result to the existing event

Event Data	Lab Results	Concerns	Persons	Tasks	Calendar	Event Properties	Event History
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Labs								
Lab No.	Specimen Date	Specimen Number	Specimen Type	Result	Result Status	Result Value	Test	Last Update
▶ 1	02/20/2021	343753945743	Nasopharyngeal swab	Detected			2019-nCoV RNA XXX NAA+probe...	03/04/2021

Add Lab Result	Update Lab Result	Delete Lab Result
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# Add a New Lab on Existing Event

- Enter all lab information and click Save

Event Data

Lab Results

Concerns

Persons

Tasks

Calendar

Event Properties

Event History

Labs

Lab No.	Specimen Date	Specimen Number	Specimen Type	Result	Result Status	Result Value	Test	Last Update
▶ 1	02/20/2021	343753945743	Nasopharyngeal swab	Detected			2019-nCoV RNA XXX NAA+probe...	03/04/2021
2	03/01/2021	89474594	Nasopharyngeal swab	Positive			SARS-CoV-2 Antigen (Ag) Res...	03/04/2021



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## **New Person, New Event or New Lab?**

Now you should be able to identify which is which and avoid duplicates

## **Questions?**

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If you accidentally create a duplicate person or event, please contact the NCEDSS Helpdesk at: [NCEDSShelpdesk@dhhs.nc.gov](mailto:NCEDSShelpdesk@dhhs.nc.gov) or call (919)715-5548 or toll-free at (877)625-9259

